

Compensation Reporting - 990 Schedule J - Part II

Name **McRobbie, Michael**
 Title **President**
 Employee ID **0001770984**

compiled by LK
 reviewed by samn
 Reviewed by nguyen9 on 03/05/2019

2012-2017 Form W-2	2012	2013	2014	2015	2016	2017
Manually insert Box 1 or Box 5 of W-2, whichever is greater (should equal Line 27)	966,404	844,928	787,731	1,109,902	871,934	1,625,400
Insert portion of Box 5 of W-2 that represents base salary (less employee deferred retirement contribution amounts)	493,007	491,388	494,612	523,650	550,170	562,594
Sick pay paid out	-	-	-	-	-	-
Insert portion of Box 5 of W-2 that represents employee contribution to 401(k) plan	-	-	-	-	-	-
Insert portion of Box 5 of W-2 that represents employee contribution to 403(b) plan	45,000	58,000	57,000	48,000	46,700	48,000
(B) (i) Reportable base salary	538,007	549,388	551,612	571,650	596,870	610,594
Insert amount of Box 5 of W-2 that represents bonuses -- performance-based only	-	187,428	111,149	113,372	150,000	156,688
(B) (ii) Bonus & incentive compensation	-	187,428	111,149	113,372	150,000	156,688
Insert portion of Box 5 of W-2 that represents longevity bonus	-	-	-	-	-	-
Insert portion of Box 5 of W-2 that represents severance	-	-	-	-	-	-
Insert portion of Box 5 of W-2 that represents Taxable Group Term Life Insurance (>\$50k)	-	-	-	-	-	-
Insert portion of Box 5 of W-2 that represents taxable housing	48,000	48,000	48,000	48,000	48,000	48,000
Insert portion of Box 5 of W-2 that represents taxable travel/relocation expenses	-	-	-	-	-	-
Insert portion of Box 5 of W-2 that represents tax gross-ups paid	17,854	18,617	18,656	18,570	28,251	17,009
Insert portion of Box 5 of W-2 that represents other reportable compensation ("please describe the other compensation") Other compensation includes allowances for internet and communications, and non-cash fringes paid for personal accident insurance and additional life insurance, Healthy IU Incentives, Supplemental Academic - Exempt only	362,542	41,495	58,314	358,310	48,813	793,109
(B) (iii) Other reportable compensation (in box 5)	428,397	108,112	124,970	424,880	125,064	858,119
Total of (B)(i), (ii) and (iii) must tie to Box 5 of W-2	966,404	844,928	787,731	1,109,902	871,934	1,625,400
Deferred/Accrued Compensation & Retirement from the Employer						
Employer contribution -- 401(k) plan						
Employer contribution -- 403(b) plan (IURET)	30,000	30,600	31,200	31,800	31,800	32,400
Employer contribution -- 457(f) plan - Deferred Compensation		100,000	100,000	100,000	150,000	200,000
Employer contribution -- 401(a) (SERP \$6,240 + \$36,045 Replacement Base)	6,000	41,447	158,526	202,039	98,187	108,160
Defined benefit retirement plan -- reasonable estimate of actuarial value increase	34,561	116,000		148,583	94,062	(5,730)
(C) Deferred Compensation -- Total	70,561	288,047	289,726	482,422	374,049	334,830
Nontaxable Benefits -- Health & Welfare						
Employer contributions:						
Employer contribution to Medical Insurance	6,162	6,054	6,436	6,754	7,020	5,783
Employer contribution to Dental Insurance	772	817	839	880	922	676
Employer contribution to Vision Insurance						
Employer contribution to Nontaxable life insurance premiums (<\$50k)	167	167	180	-	-	167
Employer contributions to Short-term disability insurance						
Employer contributions to long-term disability insurance						
Employer-provided housing (if nontaxable)						
Employer contributions to Other Nontaxable Benefit -- (Health Savings Account:)	2,400	2,500	2,500	2,600	2,600	2,600
Employer contributions to Other Nontaxable Benefit -- (Personal Accident Insurance)		-		180	180	180
(D) Nontaxable benefits -- Total	9,501	9,539	9,955	10,414	10,722	9,406
(E) Total of columns (B)(i)-(D)	1,046,466	1,142,514	1,087,412	\$ 1,602,738	\$ 1,256,705	1,969,636
(F) Pre-Tax Deduction (Employee Contributions)						
Employee contribution to Medical Insurance	2,515	2,945	3,338	3,566	3,805	4,069
Employee contribution to Dental Insurance	328	365	377	402	425	312
Employee contribution to Health Saving Account/Medical Savings	4,850	4,950	5,050	5,050	5,150	5,150
IU Tax Deferred Account	17,000	17,500	17,500	18,000	21,200	18,000
IU 457(b) Retirement Plan	17,000	17,500	17,500	18,000	22,500	24,000
IU 457(b) Retirement Plan - Catch Up	5,500	17,500	16,500	6,000	1,500	-
IU Tax Deferred Account - Catch Up	5,500	5,500	5,500	6,000	1,500	6,000
(F) Pre-Tax Deduction (Employee Contributions) Total	\$ 52,693.21	\$ 66,260.25	\$ 65,764.54	\$ 57,018.05	\$ 56,080.29	\$ 57,531.46